



YEARLY GIVING TIMELINE WORKSHEET

DONOR TO RETAIN

Total number of prospects:xxx

Total potential giving: \$xxx,xxx

Goals: \$xxx,xxx

Donor prospect groupings by calendar

January - July:

August - December:

Monthly Donors:

Deadlines	Action	Who Responsible
Jan	Finalize plans, prospect groups, strategies, and timeline, and excellent Thank You phone calls, emails, or special notes to all donors	
Feb	Send written report to donors highlighting impact of their giving, emphasize Group A donors (those that gave previously between January and June). Email follow-up to written report	
Mar	Phone calls and meetings to Thank and Report	
Apr	Specific requests to give via face to face meetings. Host vision events for new donor recruiting and leadership briefings for donors to retain and donors to regain. Follow-up to donors and prospects is ongoing.	



DEVELOPMENT

AND LEADERSHIP COACHING

- May Continue specific requests to give via face to face meetings. Host vision events for new donor recruiting and leadership briefings for donors to retain and donors to regain. Follow-up to donors and prospects is ongoing.
- Jun Follow-up to all donors who you have asked for giving.
- Jul Update planning and prospect lists, pay careful attention to those donors who were not Retained in the first six months and how they should be rolled into your August-December efforts.
- Aug Send written report to donors highlighting impact of their giving, emphasize Group B donors (those that gave previously between August and December). Email follow-up to written report.
- Sep Phone calls and meetings to Thank and Report. Finalize preparations for year end giving efforts and communications.
- Oct Specific requests to give via face to face meetings and broader communications. Host vision events for new donor recruiting and leadership briefings for donors to retain and donors to regain. Follow-up to donors and prospects is ongoing.
- Nov Face to face meetings and small groups ongoing. Follow-up ongoing.
- Dec Final communications efforts, ongoing updates to prospects and donors, focus on implementing all final efforts with attention through Dec 31.



DONORS TO REGAIN

Total number of prospects:xxx
 Total potential giving: \$xxx,xxx

Goals: \$xxx,xxx

Deadlines	Action	Who Responsible
Jan	Finalize prospect list and total potential giving. Identify at least 30-100 to focus on specifically for the calendar year.	
Feb	Send special written report to donors to regain highlighting impact of their giving, emphasize Group A donors (those that gave previously between January and June). Email follow-up to written report	
Mar	Phone calls and meetings to Thank and Report	
Apr	Host face to face meetings to reconnect with past donors. Host leadership briefings for donors to retain and donors to regain. Be careful to only ask for giving in your follow-up efforts, which may be best to hold on until the second half of the year, depending on the past donors. Follow-up to these meetings with requests to give as needed/appropriate.	
May	Continue specific requests to give via face to face meetings. Continue leadership briefings for donors to regain. Follow-up to donors and prospects is ongoing.	
Jun	Follow-up to all donors who you have asked for giving.	
Jul	Update planning and prospect lists, pay careful attention to your progress in re-connecting with donors to regain.	
Aug	Send written report to selected donors to regain highlighting impact of their giving, Email follow-up to written report.	



- Sep Phone calls and meetings to Thank and Report. Finalize preparations for year end giving efforts and communications.
- Oct Specific requests to give via face to face meetings and broader communications. Host leadership briefings for donors to retain and donors to regain. Follow-up to donors and prospects is ongoing.
- Nov Face to face meetings and small groups ongoing. Follow-up ongoing.
- Dec Final communications efforts, ongoing updates to prospects and donors, focus on implementing all final efforts with attention through Dec 31.

DONORS TO RECRUIT

Total number of prospects: xxx

Goals: \$xxx,xxx

Deadlines	Action	Who Responsible
Jan-Feb	Planning for Special Projects, Small Group Events, and Large Group Events and follow-up for Donors to Recruit	
Mar-Apr	New Donor recruiting events (large group events or vision events)	
May-Jun	Follow-up to successful events with thanking and reporting, Follow-up to Vision Events with requests to give	
Jul	Evaluate progress and update plans and systems for New Donors Recruiting in the second half of the year	



Aug	Thanking/Reporting Communication or Excellent Content sent to New Donor Prospects on mailing list. No requests to give included.
Sep-Oct	New Donor recruiting events (large group events or vision events)
Nov	Final New Donor Recruiting Events (large group events or vision events), follow-up to past attendees of events, specific requests to give and follow-up ongoing.
Dec	Final communications efforts, ongoing updates and follow-up to prospects, focus on implementing all final efforts with attention through Dec 31.

NON-DONORS

Total number of prospects:

No Goals at this time

Deadlines

Action

Who Responsible

Jan-Feb	Planning for Volunteer events to invite non-donors to, Advisory Groups to invite them to participate in, and Large Group Events, emphasis should be place on creative communications that only provides great content and stories through the year
Mar-Apr	Excellent communication to non-donors, invite to one event, advisory group, or volunteer opportunity for the first six months.
May-Jun	Follow-up to successful events or activities with thanking and reporting



DEVELOPMENT

AND LEADERSHIP COACHING

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| Jul | Evaluate progress and update plans and systems, perhaps Non-Donors who participated in the first six months or responded in some way should be now added to the Donors to Recruit lists for the second half of the year. |
| Aug | Excellent communication to Non-Donors, invite to one event, advisory group, or volunteer opportunity for the first six months. |
| Sep-Oct | Follow-up to successful events or activities with thanking and reporting. |
| Nov | Ongoing communication to Non-Donors, general awareness of goals and stories of lives impacted, selected stories of impact of other donors. |
| Dec | Final communications efforts, ongoing updates but only no specific or targeted requests to give, focus on implementing all final efforts with attention through Dec 31. |